



# Welcome To VMS365 Client Userguide

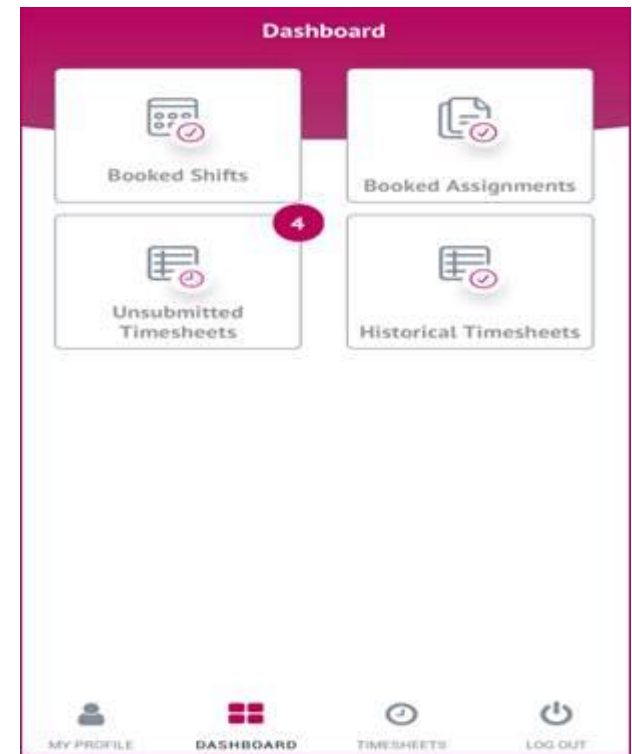
August 2017

# Retinue Health App

As well as our fully functional website [www.vms365.co.uk](http://www.vms365.co.uk), Retinue now have a app that you can download from any Smart phone or tablet to use on the go! Simple go to the 'App store' and search 'Retinue client app'

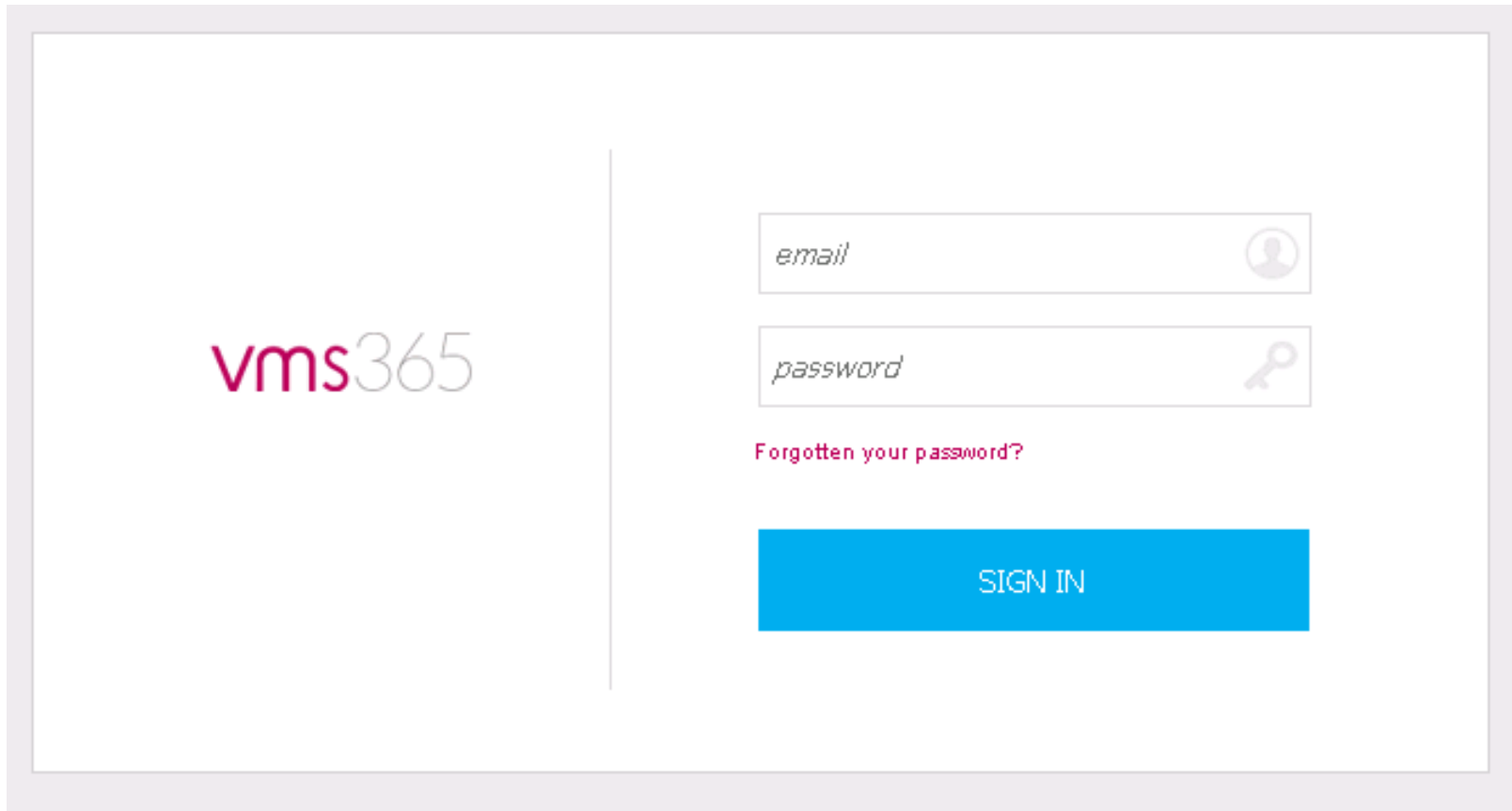
By downloading the app you will be able to do any of the below features on the go and with the ease of not having to log on to a computer

- Add on shifts/assignments
- View any outstanding shift/Assignments
- Book/Confirm candidates in to shifts
- Authorise timesheets



# Login Page

- URL is: [www.vms365.co.uk](http://www.vms365.co.uk)
- Username is your e-mail address
- Select “forgotten your password?” to receive a link to re-set the password














The screenshot shows the login interface for vms365. On the left, the vms365 logo is displayed. To the right, there are two input fields: the first is labeled 'email' with a user icon, and the second is labeled 'password' with a key icon. Below these fields is a link that says 'Forgotten your password?'. At the bottom right, there is a blue button labeled 'SIGN IN'.

# Dashboard

- Each box represents an action which can be carried out
- The number represents the amount of jobs against the action
- Click on the box and it will direct you to complete and action

## Retinue Health

[New Job](#)

 <div>1 JOBS NOT APPROVED</div> <div>VIEW MORE &gt;</div>	 <div>12 JOBS NOT OUTSOURCED TO BANK</div> <div>VIEW MORE &gt;</div>	 <div>12 JOBS LIVE, WITH NO CANDIDATES</div> <div>VIEW MORE &gt;</div>	 <div>2 JOBS LIVE, CANDIDATES SUBMITTED</div> <div>VIEW MORE &gt;</div>	 <div>0 JOBS LIVE, CANDIDATES INTERVIEW REQUESTED</div> <div>VIEW MORE &gt;</div>	 <div>1 JOBS LIVE, CANDIDATES OFFERED PLACEMENT NOT CREATED</div> <div>VIEW MORE &gt;</div>
 <div>4 PLACEMENTS STARTING THIS WEEK</div> <div>VIEW MORE &gt;</div>	 <div>4 PLACEMENTS ENDING THIS WEEK</div> <div>VIEW MORE &gt;</div>	 <div>0 PLACEMENT EXTENSIONS PENDING APPROVAL</div> <div>VIEW MORE &gt;</div>	 <div>2 TIMESHEETS PENDING APPROVAL</div> <div>VIEW MORE &gt;</div>	 <div>0 NEW ARTICLES</div> <div>VIEW MORE &gt;</div>	




Retinue Health is downloadable as  
a mobile app.



# Client Profile

- Profile displays your details
- Password can be reset here
- E-mail notifications will be sent to the email address in the system



HomeProfileCandidatesMessagesJobs

EMPLOYER

Employer:

Test Client

Title:

Ms

First name:

Retinue

Last name:

Health

Email:

kate@test.com

Mobile:

Tel

Password:

Password

Turn Off Email Notification:

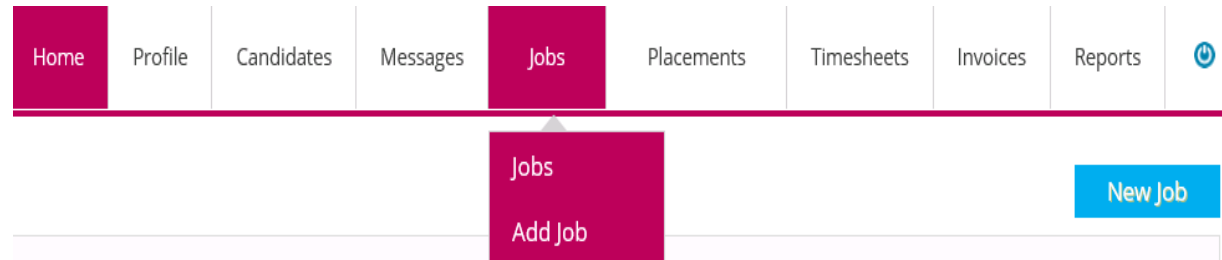
☒

Save



# Create a job

- Select “New job” or ‘Add job’



- This will take into the job wizard to enter the details of your job
- Select where the job will be based
- Is it a shift or an assignment?

## Hints and tips -

- *Shift: for Singular shifts for different dates/times*
- *Assignment: to be used for any roles longer than 7 days*

Choose the hierarchy level you are creating the job for \*:

Test Client

What kind of job will this be:

Shift-based job

Assignment

Shift-based job

# Create a job

- Each job has a unique 4 digit reference
- Select from the drop down menu the required worker
- Category/ Title/ Justification are pre-defined
- Select a reason for the hire i.e short term illness
- Location matches the hierarchy you have selected, this is where the worker will be located

*Please ensure the correct 'Justification reason' is used against vacancies, as this will be documented on reporting.*

vms365

HomeProfileMessagesJobs

### Adding a Job with reference PKBN

Category \*:

Care (Qualified)

Title \*:

Social Worker - Level 2 - Adults

Justification \*:

Existing Vacancy

Number of workers:

1



Location:



**Boston/South Holland Locality Team - The Vista**  
The Vista, Churchgate, Spalding, Lincolnshire, PE11 1QF

Continue



# Create a job - shift

- Enter your shift pattern using the date and time picker, then select the + button to add
- Shift will appear below (grey box). Add notes against the individual shift.
- Pay rates are dictated by the shift time, if it covers multiple time periods, multiple rates will show

Start:    

End:    

+

	Start Date & Time	End Date & Time	Notes	Pay Rate						Candidates	
1	08/08/17 02:00	08/08/17 09:00	<div style="border: 1px solid #ccc; height: 40px;"></div>	Night £ 20.00	Standard £ 15.00	Saturday £ 20.00	Sunday £ 25.00	Sleep-in multiplier £ 45.00	Bank holiday £ 30.00	<div style="border: 1px solid #ccc; padding: 2px;">1</div> <div style="border: 1px solid #ccc; padding: 2px;">+</div>	 

- Select the blue “repeat” button to bring up the calendar
- Select the dates on the calendar you would like to repeat the shift
- You can add different rate times/ dates and repeat to create a full rota

Candidates							
1	<div> <div>«</div> <div>«</div> <div>September 2017</div> <div>»</div> <div>»</div> </div>						
	M	T	W	T	F	S	S
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10
38	11	12	13	14	15	16	17
39	18	19	20	21	22	23	24
40	25	26	27	28	29	30	1
41	2	3	4	5	6	7	8
<div>Repeat</div> <div>Close</div>							



# Create a job

- If the shift pattern is not known, use an assignment job
- Use the date picker to select an expected start and end date
- Pay rates shown are potential rates the candidate could claim throughout the duration of their placement

## Adding a Job with reference PDGH

Is back dated:



Start date:



End date:



Rate Values:

-----

Non-Standard 75.00

Standard 60.00

-----

# Create a job

- Standard requirements are items the successful candidate must have in order to complete the role i.e current CV, DBS, References, Right To Work
- Click the blue plus icon to add further documentation

## Standard requirements

Add new requirement:

Candidate has basic life support?



Start		
1	Candidate has basic life support?	
2	Candidate has right to work in the UK?	

- **Option:** add multiple documents for the supplier to understand the role
- **Option:** free text box to add any additional information needed for the supplier/candidate

Add new document:

Select



Name		
1	Demo - job description.doc	

Description:

Confirm

# Create a job

- Select cost centre from a drop down menu

Cost centre:

1234

Confirm

- You will be listed as the hiring manager, this can be changed
- Select multiple timesheet approvers to ensure timesheets can be approved in times of sickness, annual leave etc.

Hiring manager:

Gill Dee

Timesheet approver(s):

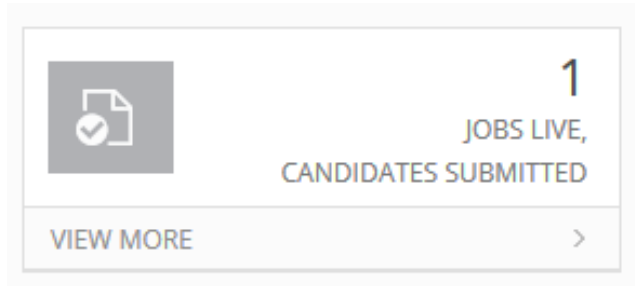
Gill Dee

Save as Draft

Submit

# Viewing Candidates

- When a job has been created, it is Retinue's responsibility to provide you with candidates



- Select “Candidates submitted” on the dashboard
- Select the job reference number to enter the job
- Each job has its own workflow, highlighted tabs show you the status' candidates are in

Potential candidates (0)		Schedule		Applied	Interview Requested	Booked	Confirmed	Rejected
Name	Agency	Shifts						
No records to display.			Schedule Shifts					
Unfilled	Needed	From	To	Hours	Pay rate	Notes	Status	Candidates
1	1	07 Nov 2016 10:00	07 Nov 2016 16:00	(6)	£360.00		Vacant	(No Candidate)
1	1	08 Nov 2016 10:00	08 Nov 2016 16:00	(6)	£360.00		Vacant	(No Candidate)

# Viewing Candidates

Applicants (1)

Name

Agency

Shifts

Rates

Willma Wally

Demo Locums Agency

5 Shifts

£

Schedule

Applied

Interview Requested

Booked

Confirmed

Rejected

Applied Shifts

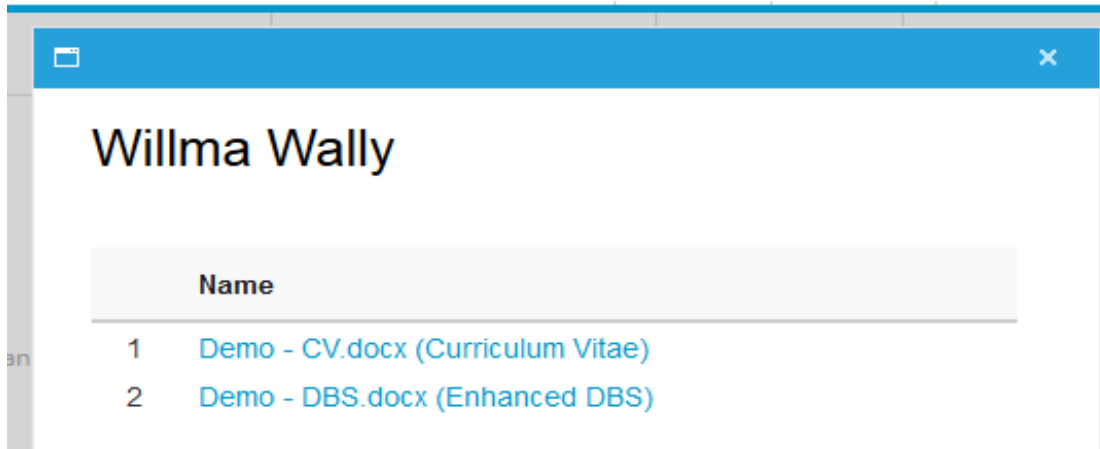
Request Interview

Book

Reject

Unfilled	Needed	From	To	Hours	Pay rate	Notes	Status	Candidates	
1	1	07 Nov 2016 10:00	07 Nov 2016 16:00	(6)	£360.00		Vacant	(No Candidate)	
1	1	08 Nov 2016 10:00	08 Nov 2016 16:00	(6)	£360.00		Vacant	(No Candidate)	
1	1	09 Nov 2016 10:00	09 Nov 2016 16:00	(6)	£360.00		Vacant	(No Candidate)	

- Select “Applied” tab to view candidates
- View candidate, Agency they are from, how many shifts they are submitted against (if applicable) and their cost per shift (£)
- Click candidate’s name to view their compliance documents



# Viewing Candidates

- **Once viewed you have 3 options with each candidate**
- **Reject:** Candidate is not appropriate, select from a mandatory drop down reason for why the candidate is being rejected
- **Request an interview:** Bring the candidate in for an interview to understand if they are appropriate to complete the role
- **Book:** Viewing the CV is sufficient to confirm you would like the candidate to complete the work

Request Interview

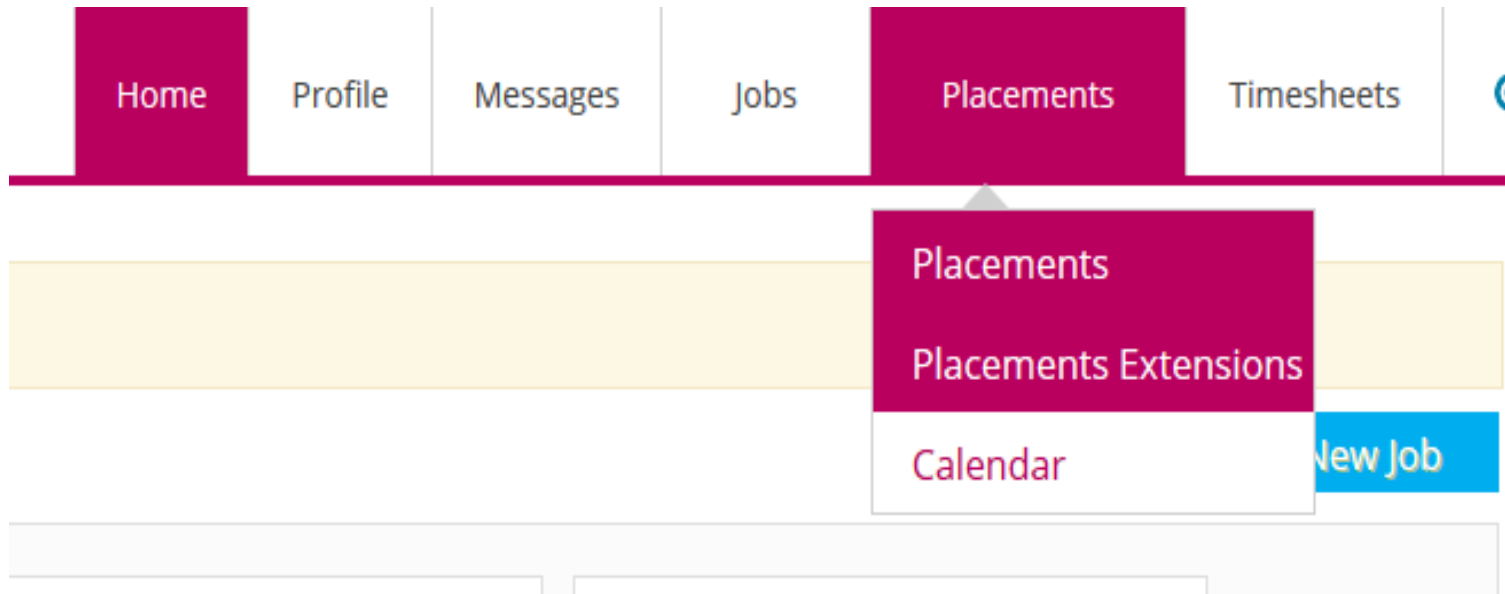
Book

Reject

- Once the candidate is booked, Retinue will create the placement for the worker and confirm they will be taking the position

# Shift calendar view

- View shifts in a 7 day calendar view to easier understand which workers will be in each day



- On the dashboard, hover over the “Placements” tab and select “Calendar”

# Shift calendar view

SEARCH

All shifts

No candidates

Candidates to review

Candidate booked, not confirmed

Filled

← → today

26/12/2016 - 01/01/2017

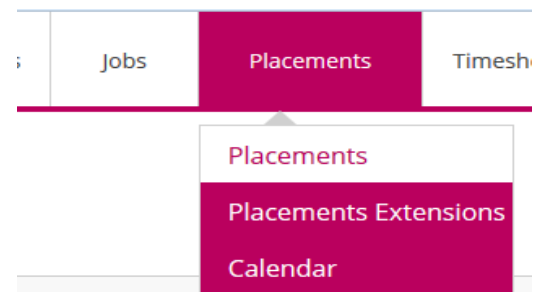
Monday 26 Dec 16	Tuesday 27 Dec 16	Wednesday 28 Dec 16	Thursday 29 Dec 16	Friday 30 Dec 16	Saturday 31 Dec 16	Sunday 01 Jan 17
<div>Speciality Doctor - Ophthalmology 07:00 - 15:00</div> <div>Ward 1 Manager: Gill Dee</div>	<div>Speciality Doctor - Ophthalmology 07:00 - 15:00</div> <div>Ward 1 Manager: Gill Dee</div>	<div>Consultant - Adult Mental Health 07:30 - 14:00</div> <div>Ward 1 Manager:</div>	<div>Speciality Doctor - Ophthalmology 07:00 - 15:00</div> <div>Ward 1 Manager: Gill Dee</div>	<div>Consultant - Adult Mental Health 08:00 - 22:00</div> <div>ICU Manager:</div>	<div>Speciality Doctor - Ophthalmology 07:00 - 15:00</div> <div>Ward 1 Manager: Gill Dee</div>	<div>Consultant - Adult Mental Health 08:00 - 16:30</div> <div>ICU Manager: Hayley Todd</div>
<div>Consultant - Adult Mental Health 08:00 - 16:30</div> <div>ICU Manager: Hayley Todd</div>	<div>Consultant - Adult Mental Health 08:00 - 16:30</div> <div>ICU Manager: Hayley Todd</div>	<div>Consultant - Adult Mental Health 08:00 - 16:30</div> <div>ICU Manager: Hayley Todd</div>	<div>Speciality Doctor - Ophthalmology 07:00 - 15:00</div> <div>Ward 1 Manager: Gill Dee</div>	<div>Consultant - Adult Mental Health 08:00 - 16:30</div> <div>ICU Manager: Hayley Todd</div>	<div>Consultant - Adult Mental Health 08:00 - 16:30</div> <div>ICU Manager: Hayley Todd</div>	
	<div>Speciality Doctor 15:00 - 21:30</div>		<div>Consultant - 08:00 - 16:30</div>			

- View 7 days from the current date
- Move forward and backwards in the calendar to see future or past weeks
  - Grey:** Shift is filled
  - Pink:** requires action
- Use filters along the top e.g. no candidates, candidates to review etc. to confirm what action needs to be taken



# Extend placements

- Each shift is represented by one placement, if you wish a candidate to fill additional shifts create a new job and request the specific candidate
- If it is an assignment covering multiple dates, the end date can be edited to extend the placement



- When in placements, select “Edit” against placement that is to be extended

A screenshot of the 'Active Placements' section in the Retinue system. The top navigation bar includes 'Home', 'Profile', 'Messages', 'Jobs', 'Placements' (selected), and 'Timesheets'. On the left, there is a sidebar with 'PLACEMENTS' and 'SEARCH' buttons. The main content area shows a table of active placements with columns for Reference, Client, Job Title, Candidate, Hiring Manager, Date, End Date, Supplier, Location, Categories, Status, and Edit. Two rows are visible: PDVK-1 and TDTT-133. The 'Edit' button for the first row is highlighted in blue.

Reference	Client	Job Title	Candidate	Hiring Manager	Date	End Date	Supplier	Location	Categories	Status	Edit
PDVK-1	ICU	Consultant - Adult Mental Health	Michael Carmen	Hayley Todd	14/11/2016	27/01/2017	Pertemps Medical	2 Dragon Parade, Harrogate, North Yorkshire, HG1A 5BY, UK - England	Locums > A&E	Active	Edit
TDTT-133	ICU	Consultant - Adult Mental Health	Nigel Stanbury	Hayley Todd	30/04/2017	30/04/2017	Pertemps Medical	Circle Health Reading, Reading, RG1 1AA, UK - England	Locums > A&E	Active	

# Extend placements

CHANGE PLACEMENT END DATE

Placement extension

Reference:

PDVK-1

Candidate:

Michael Carmen

Start date:

14 November 2016

End date:

27 January 2017

New start date:



New end date:

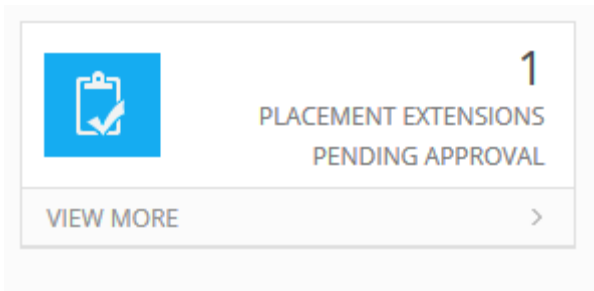


Save

Cancel

- Use the date picker to enter the new end date for the placement i.e. when you want the worker until
- It is possible to edit the start date if the candidate started working earlier or later than thoughts
- If approval is switched on for placement extensions, select from the drop down menu who is to approve

# Approving placement extensions



- The date changed that required approval will be written in green
- Select the approve/ reject button

Reference	Start Date	End Date	Candidate	Hiring Manager	Status	Approve
PDVK-1	14/11/2016	24/02/2017	Michael Carmen	Hayley Todd	ToBeAuthorised	Approve/Reject

Navigation: 1 Page size: 20 1 items in 1 pages

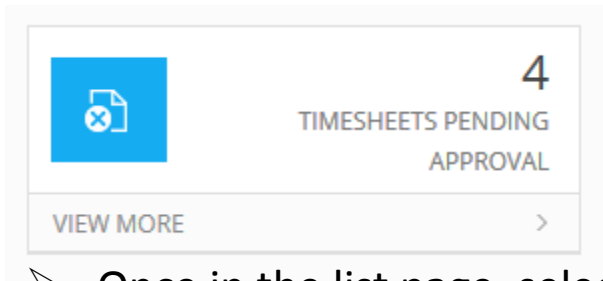
- If approved, the change in date will be set in the system
- If rejected, the date will not be changed and the hiring manager will be instructed they cannot have the worker for longer

New End Date: 24/02/2017

Reject

Approve

# Timesheet approval



- Once in the list page, select the individual timesheet reference number

Standard client rate: 85.51 p/h  
Total hours: #TD5S-5 : 7.00 hour(s)  
Total cost: £598.57  
Cost centre T1: 222222  
Cost centre T3:  
Direct engagement: Yes

## Working times

Start time and date	End time and date	Unpaid Break	Total time minus breaks	Additional Charges
24 November 2016 09:00	24 November 2016 16:00	0	7 hour(s)	
Total:			#TD5S-5 : 7.00 hour(s)	

- View the hourly rate, the total timesheet cost and any expenses claimed
- Details of individual shifts/ dates worked and any breaks taken

# Timesheet approval

[Back](#)[Dispute](#)[Approve](#)

- The option at the bottom of the timesheet will offer “Dispute” or “Approve”
- If disputed, it is mandatory to add a reason that will go to the worker to re-submit their timesheet with correct changes
- If approved, then rate the candidate and confirm if you would have them back to work for you. If “No” is selected, the candidate cannot return to your ward/location to work without review

---

## Candidate rating

---

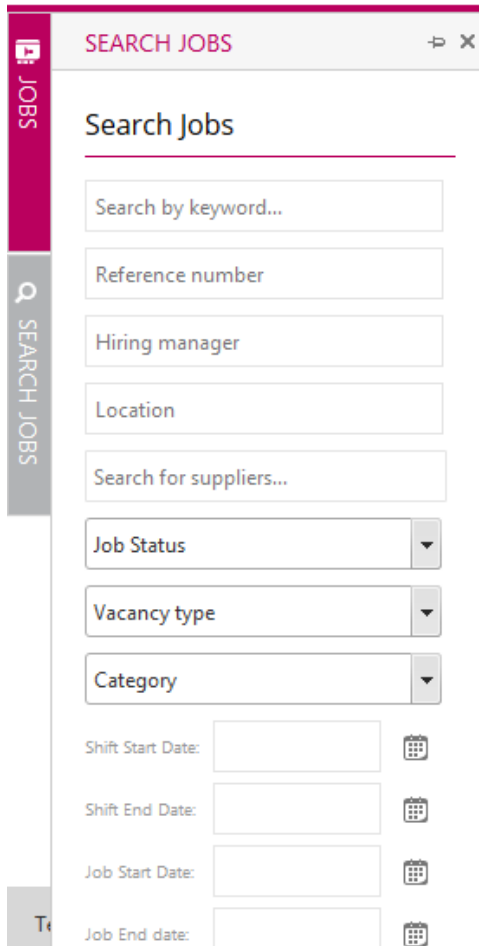
Would you accept this candidate to work for you again?

☒ Yes ☐ No

Please rate this candidate :

[Save](#)[Skip](#)

# Reporting



The screenshot displays a web application interface for searching jobs. On the left, there is a vertical sidebar with a pink header containing a magnifying glass icon and the text 'JOBS'. Below this, a grey section contains a magnifying glass icon and the text 'SEARCH JOBS'. The main content area has a pink header with the text 'SEARCH JOBS' and a close button (X). Below the header, the title 'Search Jobs' is followed by a horizontal line. The search filters are organized into two columns. The left column contains five text input fields: 'Search by keyword...', 'Reference number', 'Hiring manager', 'Location', and 'Search for suppliers...'. Below these are three dropdown menus: 'Job Status', 'Vacancy type', and 'Category'. The right column contains four date selection fields, each with a text input and a calendar icon: 'Shift Start Date:', 'Shift End Date:', 'Job Start Date:', and 'Job End date:'. At the bottom left of the sidebar, there is a small grey button with the letter 'T'.

- Pages built on a grid page allow information to be filtered
- Select pane on left-hand side of screen to expand search function
- Once filtered, use excel function to export into excel and build into reports



# Support and Resources

For additional support or queries regarding VMS365, please contact the Operations team:

Retinue Operations team on: 020 3837 7880

Retinue queries email: [LCCbookings@retinue-solutions.com](mailto:LCCbookings@retinue-solutions.com)

Operations Team Manager: Rebecca Anderson